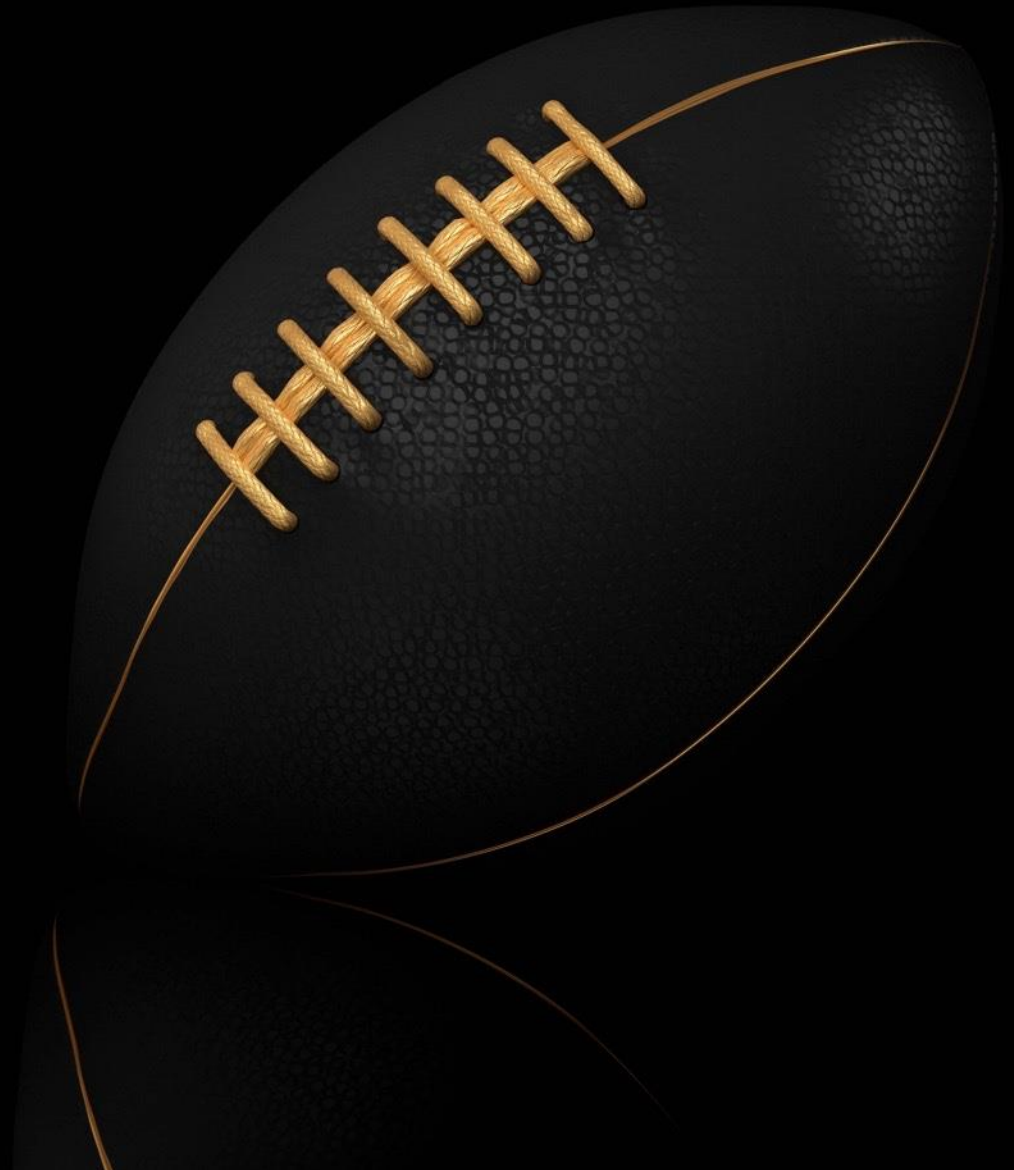
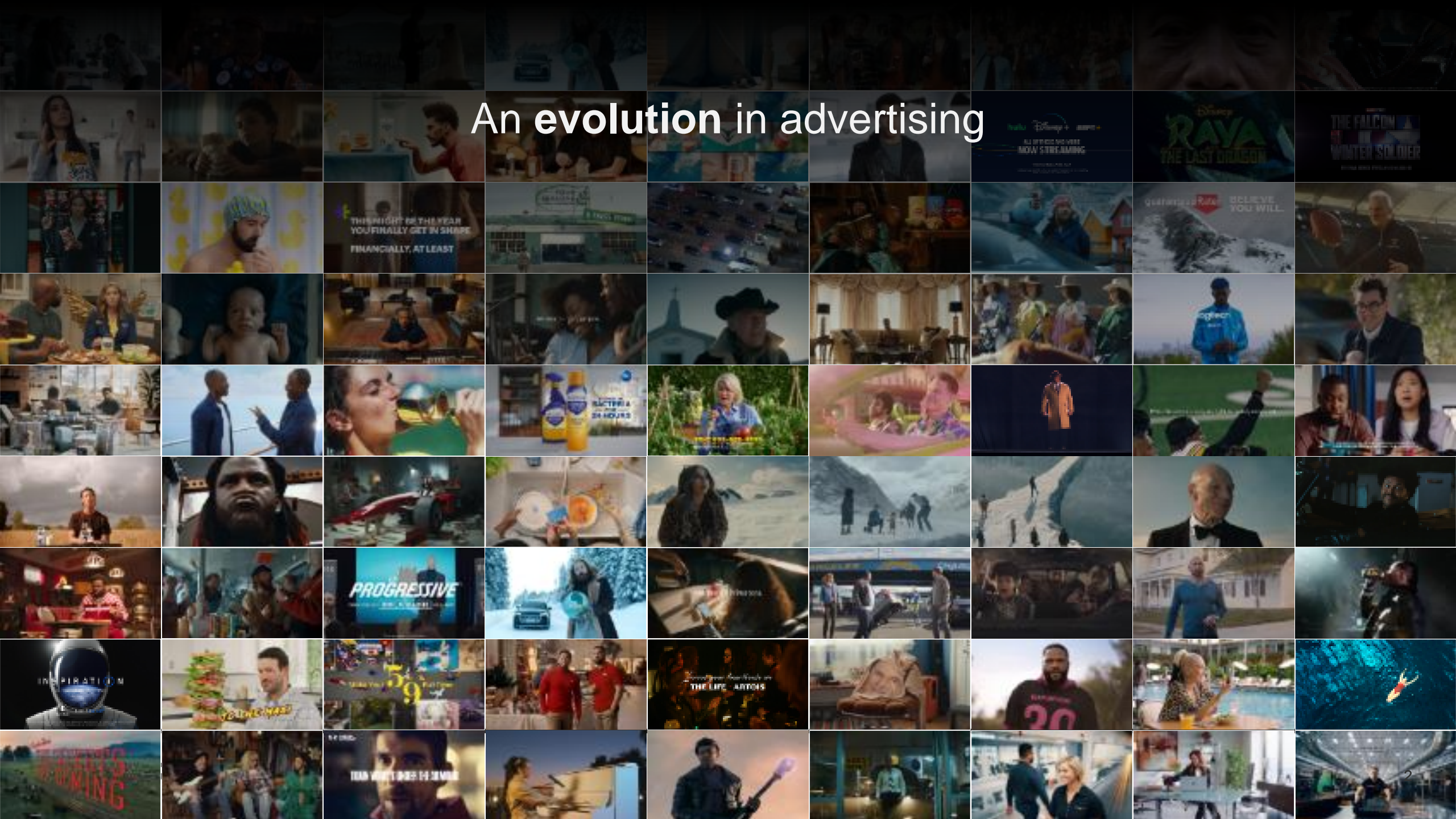


KANTAR

Super Bowl 2023
Creative
Effectiveness Report



An evolution in advertising



It's the biggest marketing event of the year for good reason

- ✓ 100+ million viewers
- ✓ #1 - among all segments
- ✓ Compelling content
- ✓ Big consumption day
- ✓ Rare "water cooler" opportunity



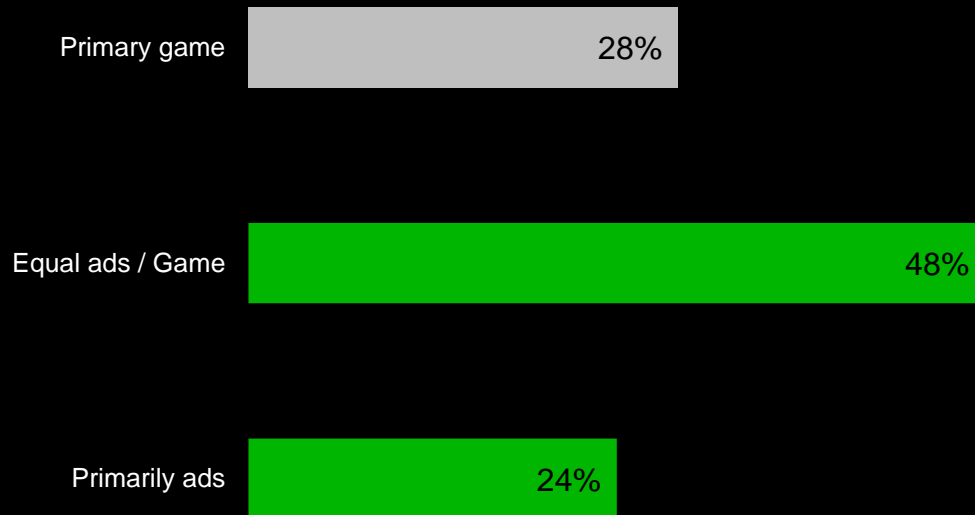
yahoo/sports
2023 NFL Playoffs: Chiefs AFC championship win sets record 53M viewers; Eagles' NFC title draws 47.5M



364 days of avoidance...

One day of hyper engagement

Attitude toward watching ads or game (all adults)
Among those who intend to watch the Super Bowl



66%

of U.S. adults agree

“I tend to enjoy Super Bowl commercials **much more** than the typical advertisements I see.”

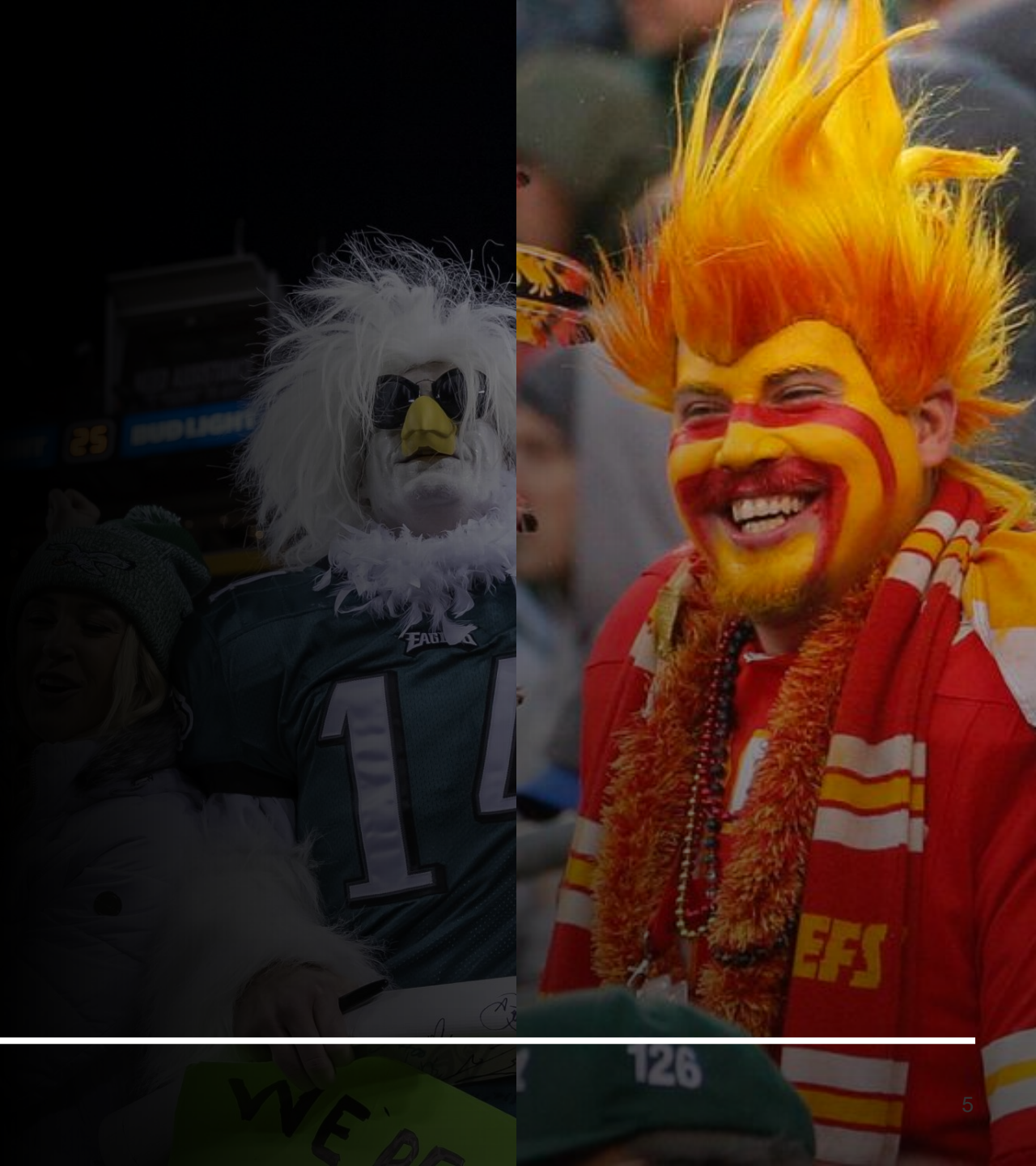
Among those who intend to watch the Super Bowl

The Upshot

A time to “turn the corner” and align with optimism and positivity

“Super Bowl LVII is **the perfect opportunity to turn the corner** on what brands say and do... The game on February 12, 2023, will be the first one since COVID began that is not overhung by mounting tensions. This is the moment for brands to **align themselves with the optimism and positivity** sought by consumers.”

J. Walker Smith,
Chief Knowledge Officer
Kantar

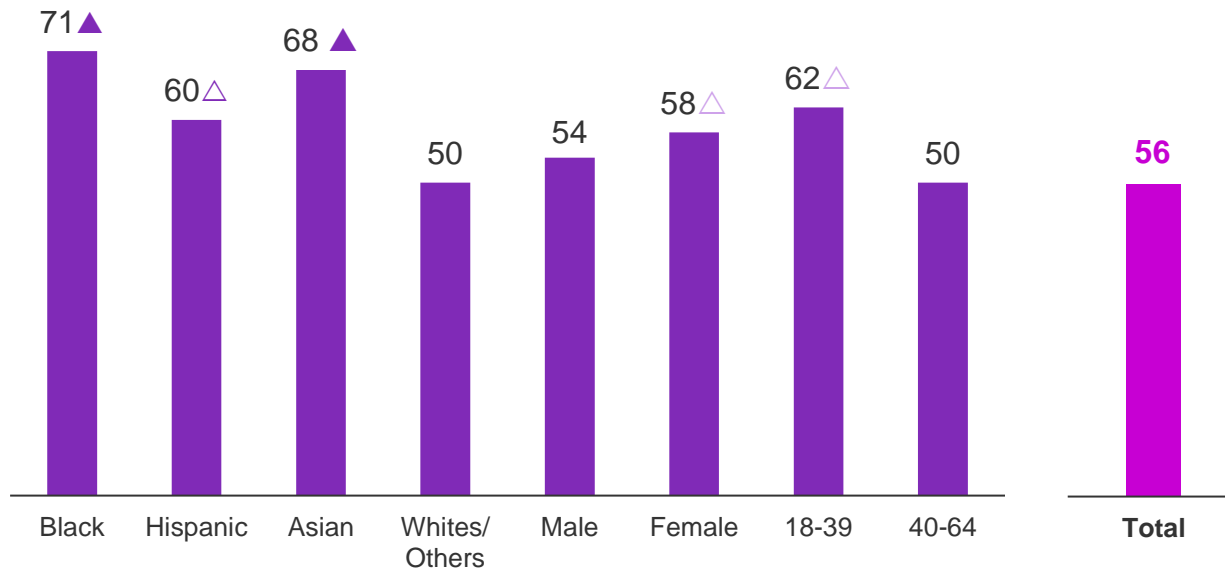


Over half of the consumers prefer Super Bowl ads that are more inclusive and diverse – more people of color, women and the younger generation

I prefer Super Bowl ads that are more inclusive and diverse

Top 2 Box - Agree (%)

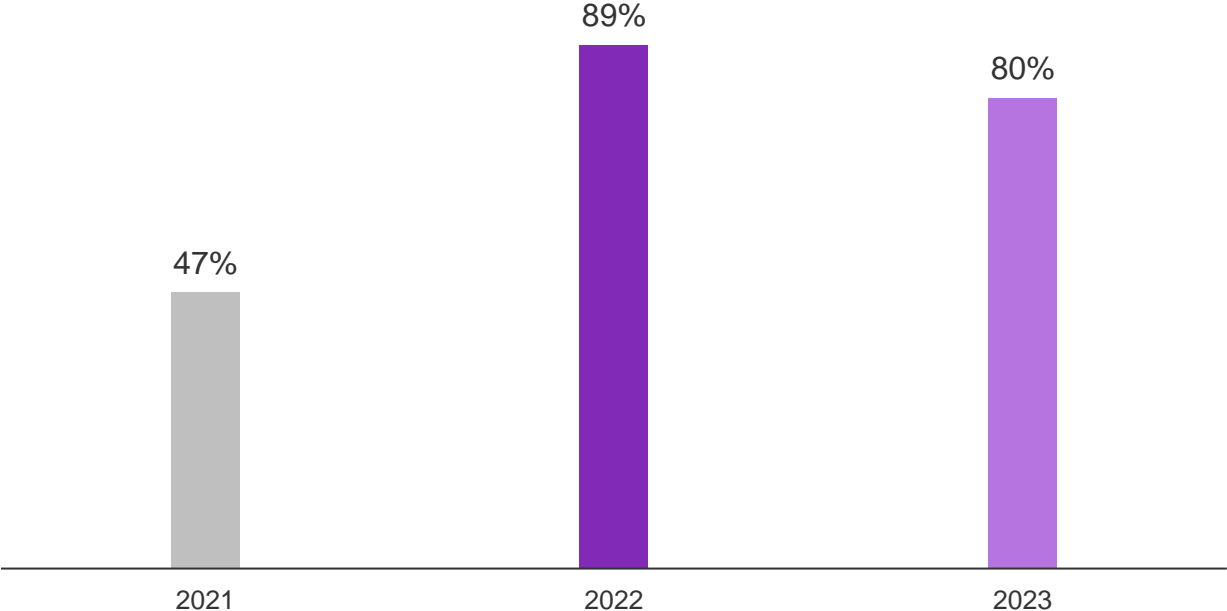
▲ Significantly different than 3 or more groups
△ Significantly different than at least one group



2022 saw a spike in ads with DEI

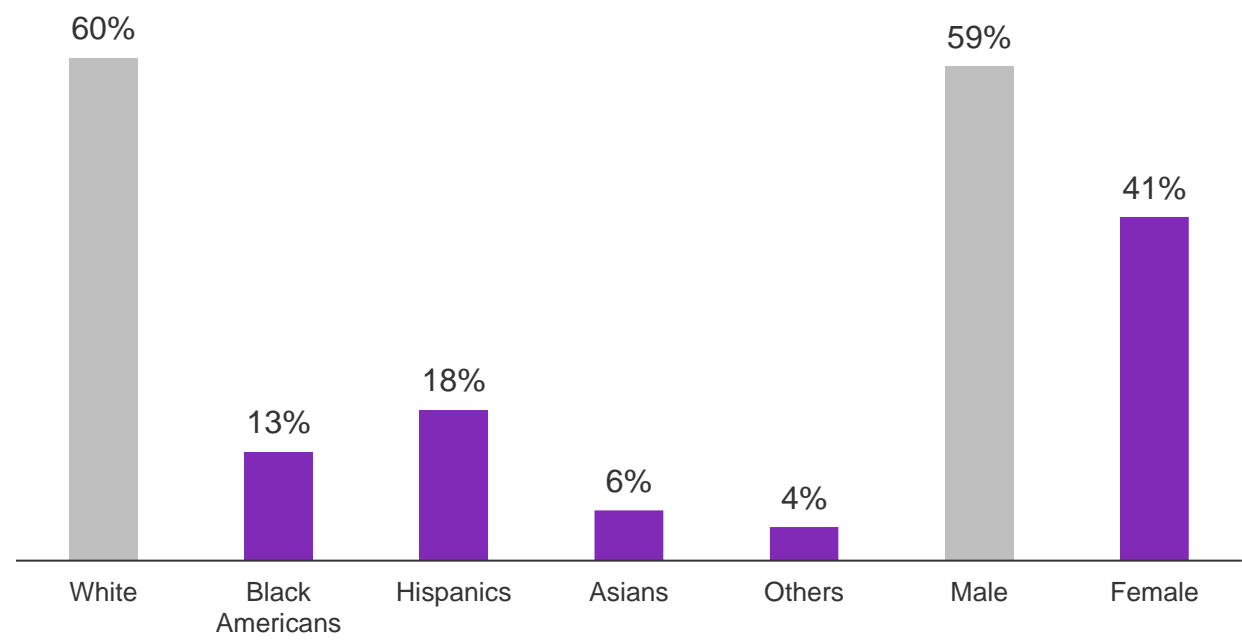
2023 shows a slightly lower representation

Diversity in Super Bowl ads
Super Bowl fan base - 112 million viewers



Super Bowl has a broad and diverse base of viewers with over 40% of people watching the Big Game being either women and / or people from different racial backgrounds

Super Bowl fan base
112 million viewers



Creative Trends



Expectations are high

48%

Want ads that offer a **positive perspective**

56%

Prefer Super Bowl ads that are **more inclusive and diverse**

61%

State it's important for brands to be **committed to making society better**



We tested all national ads that ran during the Super Bowl through Link AI

65 Ads

We've used 3 core measures to assess ad effectiveness during the Super Bowl, given that most advertisers are trying to build brand equity (over short-term sales)

Impact

How likely will the ad breakthrough and be remembered for the brand?

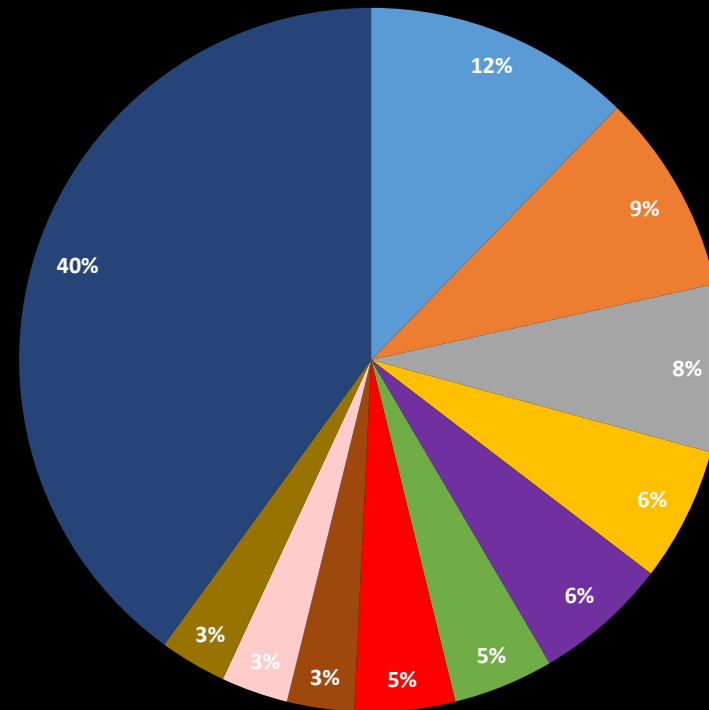
Brand Equity

How likely will the ad help contribute to long-term brand equity for the brand?

Enjoyment

How much would viewers enjoy watching this ad?

Category Breakdown of 65 ads



- Beer
- Snacks (non-confectionary)
- Electric
- Spirits
- Movie Trailers
- Technology Products - Software
- Carbonated Soft Drinks
- Other
- Streaming (Media, Entertainment)
- e-commerce
- Financial Services

2023 Super Bowl advertisers are taking “entertainment” seriously, continuing the trend of using celebrities, humor, nostalgia and famous music

62%

score above average in “Enjoyment”

71%

have celebrities

68%

use humor

31%

use widely recognizable music



Pepsi Zero Sugar “Ben Stiller”

Ben Stiller jokes with viewers on whether Pepsi Zero Sugar really tastes good or if he’s just that good of an actor.

Impact **88**
Enjoyment **93**



Busch Light “The Busch Guide”

Busch Light and Sarah McLachlan put a fun comedic twist on her ASPCA commercials.

Impact **75**
Enjoyment **86**



Michelob Ultra “New Members Day”

Actors and athletes came together to showcase Michelob Ultra to the classic music and setting of ‘Caddyshack’.

Impact **80**
Enjoyment **81**



Workday “Rock Star”

Workday used their first Super Bowl appearance to have Rockstars highlight how the corporate world misappropriates the term “Rockstar”.

Impact **80**
Enjoyment **93**

The use of DEI is expanding beyond just diversity in casting

80%

2023 ads showed a diverse cast

50% ads show diversity in active roles



Draft Kings

“All customers get a free bet”

Kevin Hart as well as a diverse ensemble cast were able to tastefully showcase DraftKings to a broad audience with a free bet on gameday.

Impact	83
Brand Equity	63
Enjoyment	88



Google

“Fixed on Pixel”

Google highlighted the new capabilities of the Pixel 7 by applying its functionality to common occurrences in day-to-day life.

Impact	72
Brand Equity	53
Enjoyment	90



Snapchat

“Wait’ll You See This”

Seeing the world differently through your imagination (and filters) will help you see the world more clearly is the key message in this ad.

Impact	67
Brand Equity	73
Enjoyment	83



Budweiser

“Six Degrees of Bud”

Budweiser shows how communities come together throughout everyday scenarios.

Impact	78
Brand Equity	59
Enjoyment	88

But will you remember the brand after the game is over?

17%

2023 ads score in the top tertile for long-term brand equity contribution (Brand Equity).



Tubi

“Interface Interruption”

Tubi was able to send many viewers into a panic as they thought they had misplaced their remote. It also made viewers know they were only a few clicks away.

Impact	69
Brand Equity	70
Enjoyment	92



Jeep

“Electric Boogie”

Dancing animals are fun and lighthearted but this touches on how cleaner and sustainable transportation is something all living things can celebrate.

Impact	95
Brand Equity	93
Enjoyment	95



The Farmer's Dog

“Forever”

We were reminded once more of the value our pets bring to our lives and what they eat matters to their long-term health.

Impact	55
Brand Equity	80
Enjoyment	51



Dunkin

“Drive Thru”

Ben Affleck, widely known to be a Dunkin fan, brought the everyday experience of getting a Dunkin coffee to life in a funny and authentic way.

Impact	90
Brand Equity	69
Enjoyment	67

2023's top performing Super Bowl ads (only 8 qualified this year)

12%

2023 ads scored in top tertile on key Super Bowl measures: Impact, Brand Equity and Enjoyment



CrowdStrike "Troy"

Cyber threats are a major concern in modern times, but CrowdStrike emphasized how foolish it is to leave yourself vulnerable and how easy it is to protect yourself from being the next Trojan horse.

Impact	73
Brand Equity	71
Enjoyment	91



Dodge RAM "Premature Electrification"

A comedic spin on formulaic pharmaceutical ads, the ad effectively positioned RAM as a way around short electric charges.

Impact	90
Brand Equity	90
Enjoyment	74



Limit Break "Limit Break"

Limit Break gave viewers the chance to obtain 1 of 10,000 NFTs through a QR code redeemable through their upcoming mobile game.

Impact	83
Brand Equity	71
Enjoyment	92



Jeep "Electric Boogie"

Dancing animals are fun and lighthearted but this touches on how cleaner and sustainable transportation is something all living things can celebrate.

Impact	95
Brand Equity	93
Enjoyment	95

2023's top performing Super Bowl ads

12%

The top scoring ads integrated the brand into their story in a memorable and differentiated way.



Hellmann's "Who's in the Fridge"

Following up on last year's popular ad, Hellmann's was able to use celebrities Jon 'Hamm', 'Brie' Larson and Pete Davidson to inspire viewers to use Hellman's.

Impact	77
Brand Equity	79
Enjoyment	70



Sam Adams "A Brighter Boston"

Sam Adams continued to build equity around its Boston heritage, using humor in an ownable way.

Impact	91
Brand Equity	76
Enjoyment	94



GM + Netflix "Why Not EV"

The combination of popular Netflix shows along with Will Ferrell brought a great deal of memorability to this EV ad.

Impact	92
Brand Equity	88
Enjoyment	94



WeatherTech "We All Win"

A regular at the Super Bowl, WeatherTech brought a more serious tone by emphasizing the values which make their company and products different.

Impact	89
Brand Equity	86
Enjoyment	94

2023's worst performing Super Bowl ads

8%

2023 ads scored below average on at least two key Super Bowl measures: Impact, Brand Equity and Enjoyment.

These ads struggle with branding.



Downy "Call Me Downy McBride"

Humor may have taken away from the brand's message and left viewers more confused about Danny McBride and Downey's intent.

Impact	29
Brand Equity	24
Enjoyment	27



He Gets Us "Love Your Enemies"

He Gets Us ran an unconventional Super Bowl ad that brought a humanistic message during polarizing times, but the branding fell short.

Impact	31
Brand Equity	9
Enjoyment	47



Church of Scientology "Live Again"

The message of the ad was hard to follow, appeared to showcase the Church of Scientology's new streaming service as well as it's philosophy.

Impact	18
Brand Equity	8
Enjoyment	63



T-Mobile "New Year New Member"

Bringing together celebrities to create a rendition of 'Grease' was entertaining but overshadowed T-Mobile as the focus.

Impact	34
Brand Equity	11
Enjoyment	28

The Super Bowl ad is
only the **tip of the
spear**

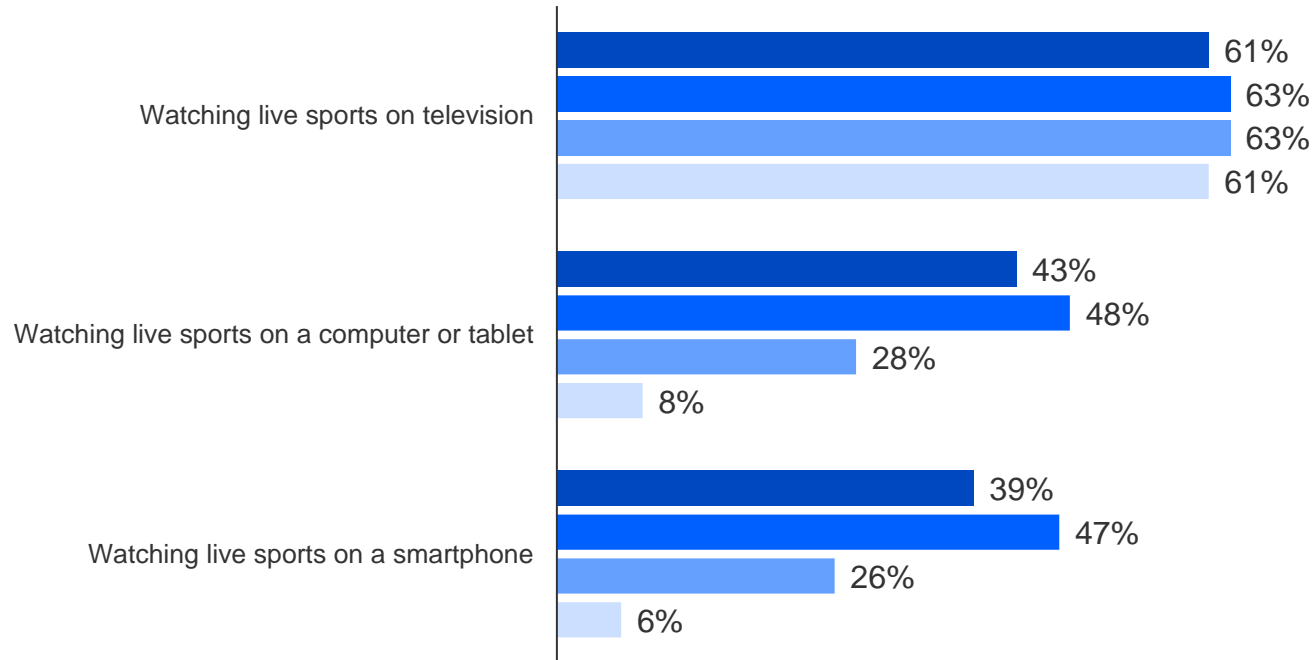


Why is that?

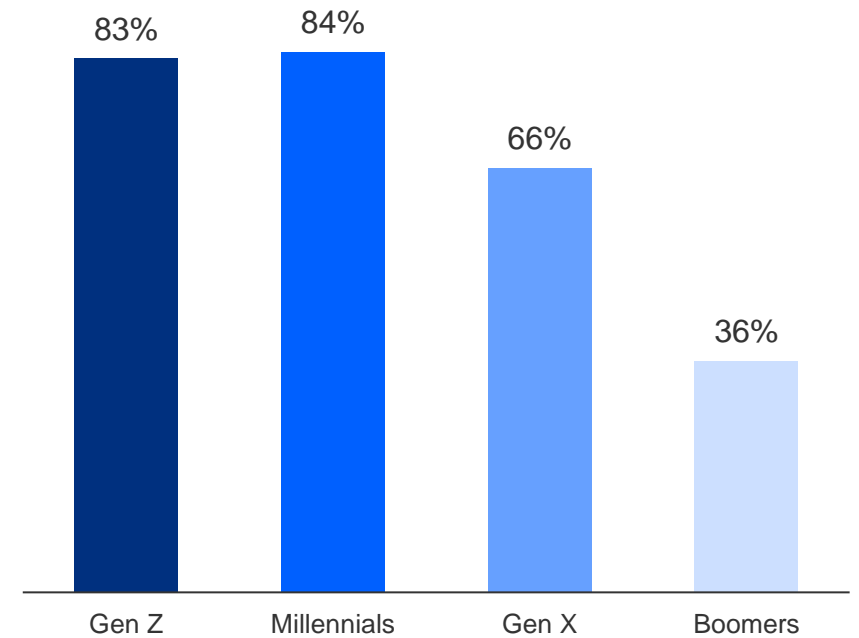
Well, smaller screens make inroads with Gen Z and Millennials

_____ is extremely/very important to my fandom

■ Gen Z ■ Millennials ■ Gen X ■ Boomers



I am likely to play games / apps on my cell phone in my spare time for fun and enjoyment



Making a human connection on social media

Most sports fans remain tied to traditional sports media like TV, but younger fans' desires depart from their older counterparts.

Coming of age immersed in social media culture, Gen Z sports fans are attracted to lighthearted, shareable memes as the top variety of sports-related content on social media over “just the facts.” Understanding the broader cultural touchstones and values of Gen Z will be required of all sports organizations seeking to capture growth in the future.

Top 5 kinds of sports-related content I engage with on social media
(among those who use social media to follow sports)

All sports fans

1.	Breaking sports news
2.	Sports facts, data and statistics
3.	Clips of recent sporting events
4.	News and opinion about my favorite team
5.	Memes

Gen Z sports fans

1.	Memes
2.	Sports facts, data and statistics
3.	Clips of recent sporting events
4.	Breaking Sports news
5.	News and opinion about my favorite team

Social Media @ the Super Bowl



Super Bowl ad spending on social has increased significantly

Ad spend for the seven brands that had Super Bowl campaigns across three timeframes

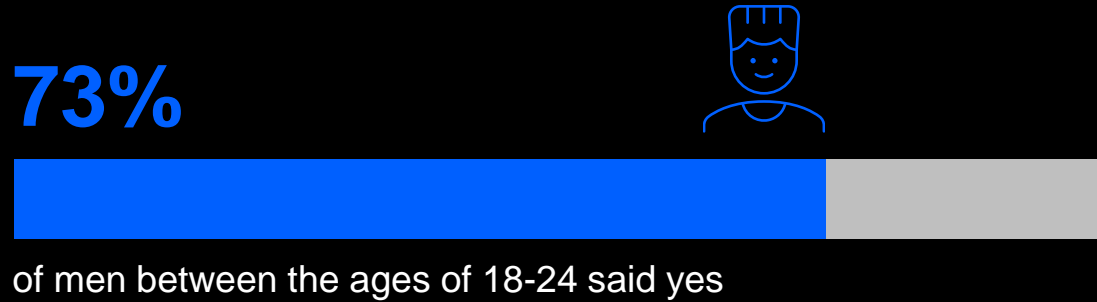
	Super Bowl		
	2012	2017	2022
Linear TV	199,952,589	197,255,491	271,940,441
Online/Mobile Video		1,104,259	28,718,375
Paid Social		243,968	26,256,759
Mobile App			6,954,324
Internet – Search	3,459,598	6,211,871	6,938,236
Radio	5,788,976	4,310,522	6,695,818
Internet – Display	19,513,987	4,358,615	5,979,476
AVOD			5,914,598
Mobile Web		2,297,499	5,206,065



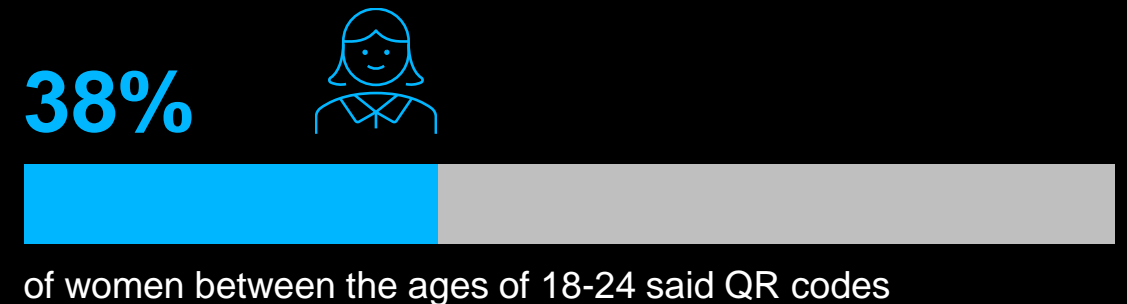
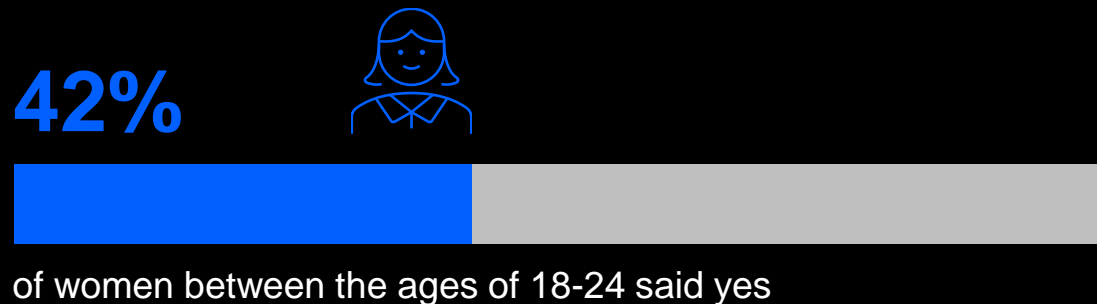
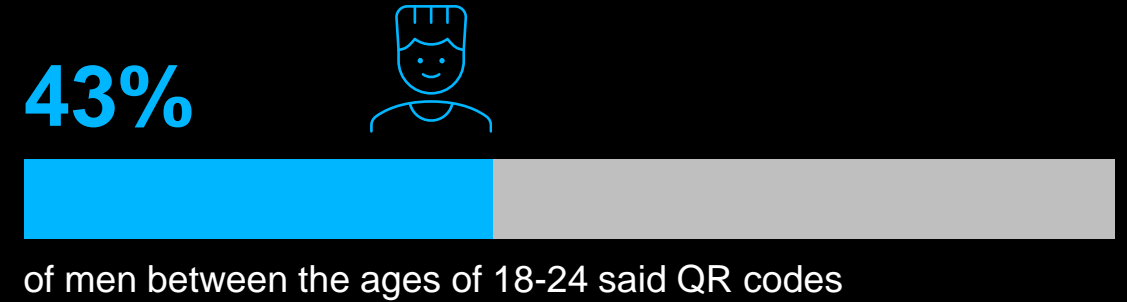
Source: Vivvix, including Paid Social data powered by Pathmatics

Younger consumers are intrigued by new interactive ad formats

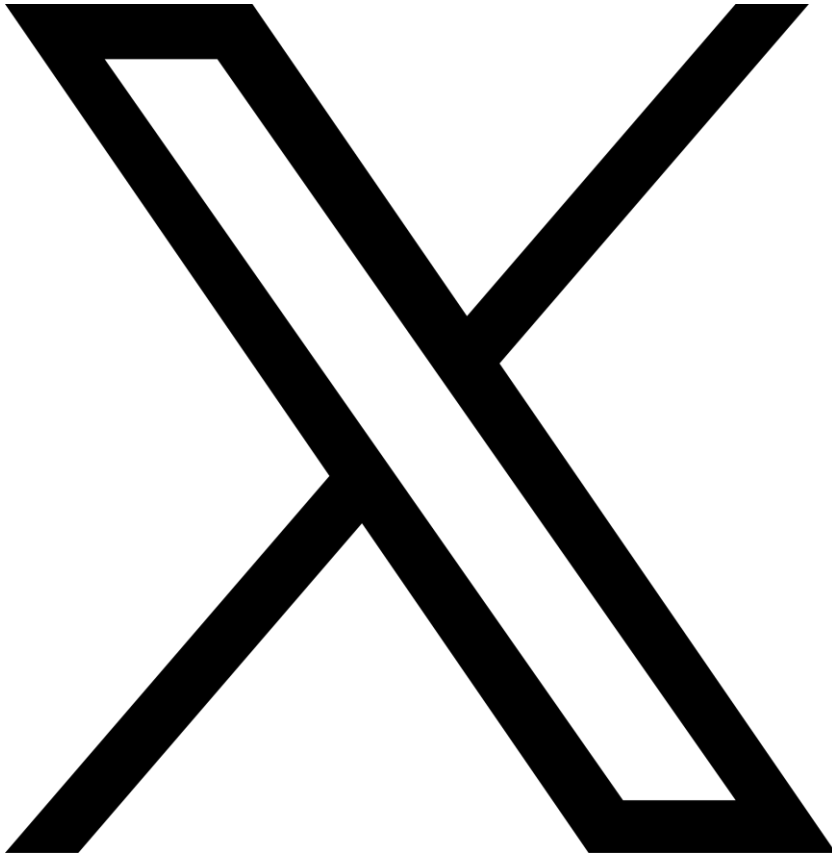
When asked if they would engage with a TikTok challenge during the Super Bowl



When asked what ad formats folks are looking forward to during the Super Bowl



Super Bowl fans' usage of X (formerly Twitter)



X (formerly Twitter): How often use this social network	
Weighted sample total count	3,403
Every day	20.80%
A few times each week	11.33%
Once a week	7.57%
About twice a month	4.00%
Less than twice a month	7.18%
I do not have an account	49.12%

The Beer & Beverage Bowl



But what about the ROI?

On average, one Super Bowl ad is **as effective as 23 regular TV ads** at driving brand perceptions

Last year, Super Bowl ads delivered solid ROIs with an average **return of \$4.5 per dollar spent**



Sample of ROI for beer brands running ads in recent Super Bowls

Bud Light Legends



Super Bowl LV

ROI \$5.5

A Clydesdale's Journey



Super Bowl LVI

ROI \$7.7

Jimmy Works It Out



Super Bowl LIV

ROI \$2.5

Kantar Insights, NA

